The Drive to Influence

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Abstract

At the heart of the educational vocation is a drive to influence, to meaningfully affect the learning and development of others. For adult educators working in higher education, daily activities – from teaching classes to supervising student research to attending faculty meetings to sitting on advisory boards – are full of opportunities to influence. Most educational literature, however, provides little insight into the way adult educators relate to their drive to influence and how this relationship affects their capacity to generate learning, both in the classroom and in their broader professional setting. By analyzing the experiences of an instructional team in teaching and inter-faculty dialogue in a higher education context in Chile this study characterizes the varying ways adult educators relate to their drive to influence. In this paper, I draw on theories of adult development and adaptive leadership, my own ten years of teaching and professional development experience in diverse adult education field settings, and research materials gathered in six semi-structured interviews with four instructors in the team. Overall, I analyze how adult educators make meaning of their drive to influence when faced with complex challenges requiring adaptive learning. I describe the two dynamic psychological processes they experience while in action: (a) the defensive behaviors they employ and (b) the recuperative tactics that enable them to think and act more strategically. By exploring how these adult educators relate to their drive to influence, this article builds understanding of the efficacy of the different psychological mechanisms that adult educators employ in attempting to facilitate learning and change among their students and colleagues. I argue that in order to increase effectiveness in mobilizing learning, adult educators must work to develop a vigilant relationship to their drive to influence, characterized by self-observation in action and greater tolerance for uncertainty.

Keywords: drive to influence; volition; adaptive leadership; adult development; adaptive learning in higher education; defensive and recuperative mechanisms in leadership

El Deseo de Influenciar

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Resumen

En el corazón de la vocación educativa se encuentra el deseo de influenciar aprendizaje y desarrollo de otros de manera significativa. Para educadores de adultos trabajando en educación superior, actividades diarias como docencia, supervisión de investigación, reuniones con pares y asesoría en consejos ofrecen la oportunidad de influenciar aprendizaje. Sin embargo, la literatura en educación provee un entendimiento limitado de cómo educadores de adultos se relacionan con su deseo de influenciar y cómo esta relación afecta su capacidad de generar aprendizaje, en el aula y en su entorno profesional. Analizando las experiencias de un equipo de profesores en docencia y diálogo entre pares en el contexto de educación superior en Chile, este artículo caracteriza las distintas maneras en que educadores de adultos se relacionan con su deseo de influenciar aprendizaje. En este artículo, utilizo teorías de liderazgo adaptativo y de desarrollo de adultos, mis propios diez años de experiencia en docencia y desarrollo profesional en diversos contextos de educación de adultos y materiales de investigación recogidos a través de seis entrevistas semi-estructuradas con cuatro profesores del departamento. En conjunto, analizo cómo educadores de adultos se relacionan con su deseo de influenciar aprendizaje cuando enfrentan desafíos complejos que requieren aprendizaje adaptativo. Describo dos procesos psicológicos dinámicos que vivencian en la acción: (a) los comportamientos defensivos que aplican y (b) las tácticas recuperativas que les permiten pensar y actuar más estratégicamente. Al explorar cómo estos educadores de adultos se relacionan con su deseo de influenciar, este artículo construye entendimiento sobre la eficacia de diferentes mecanismos psicológicos que educadores de adultos aplican cuando intentan facilitar aprendizaje y cambio con sus estudiantes y pares. Argumento que para aumentar la efectividad en movilizar aprendizaje, educadores de adultos necesitan trabajar en desarrollar una relación consciente con su deseo de influenciar, caracterizada por auto-observación en acción y mayor tolerancia a la incertidumbre.

Palabras clave: deseo de influenciar; volición; liderazgo adaptativo; desarrollo de adultos; aprendizaje adaptativo en educación superior; mecanismos defensivos y recuperativos en el liderazgo

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Educators in colleges and universities face a complex and rapidly changing landscape in higher education. Faculty are expected to be effective educators, researchers, supervisors, and active members of university governance while at the same time work with low salaries, shifting student demographics and rapid expansion of online technologies (Altbach, Reisberg, & Rumbley, 2009). In most cases, educators alone cannot tackle these challenges; they require multiple stakeholders to design and co-create solutions. Addressing these challenges can be highly adaptive because they question individuals' assumptions about their roles and their work. They demand learning new capacities. To be effective in tackling these issues, educators need to be strategic in how they deploy themselves. They need to be aware of the defensive patterns driving their thinking and they need to see how this defensiveness limits their actions. Consider the following reflection by a university professor:

> I continue to sift through the subtlety of my self-righteousness in yesterday's faculty meeting. A part of me sensed at the time that the inner stance from where I voiced my perspective was not how I wanted to enact my role; the emotional charge that held me limited my capacity to confront the problem effectively. I could sense this during the discussion and yet I continued to advocate my view. I used varying tactics, albeit unconsciously. First, I employed theoretical arguments to highlight errors in my colleagues' thinking. When that didn't work, I pointed to the ethical contradictions in their ideas. At times during the meeting, the fervor and tone of my interventions increased. At others, I remained quiet. And during all the exchange and debate, a part of me really believed I was addressing something important, something that could profoundly affect our students' learning. I felt compelled to influence, to affect the way we as a faculty team were teaching and practicing certain ideas.
>
> What I couldn't sufficiently "see" at the time however, was how "taken" and overpowered I was by my own point of view and how vehemently I advocated for it. The intolerant stance from where I voiced my perspective was even harder for me to reign in, although at the time I sensed its presence. I felt an inner battle going on in my

mind during the meeting: on the one hand there was my frustration at the contradiction in my colleagues' ideas; on the other, a greater part of me was trying to reign in my frustration to gain a broader perspective. It was like some greater part of me was trying to extract "me" from my intolerant stance to recover my psychological footing. Some part of me was trying to remind me of how blind and ineffective I was probably being by inhabiting that attitude.

In the end, my intolerance and frustration prevailed. In hindsight, my ineffective interventions in part attested to that. Later that evening, I began to see more clearly the various psychological layers that led to my erroneous way of being during the meeting. The pattern was a familiar error for me in the context of our faculty discussions. In this instance, my intolerance didn't allow me to recognize that the issue I was raising posed significant threats to my colleagues' reputation. I felt I had lost a valuable opportunity to challenge our work as a team and to improve the frameworks we were teaching our students.

The example above highlights the limited awareness that educators often bring to themselves when confronting adaptive challenges. It illustrates the way their defensive patterns and unconscious reactions inhibit learning on the very issues they are trying to address.

In the years I have spent inquiring about our awareness of defensive patterns, I have realized they affect many of us in higher education. They manifest in our critical attitude in meetings and in the classroom, in the emotional charge behind our words, in our need to control decisions, in our dogmatic adherence to our ideologies and standards, in our intolerance of different perspectives. And from what I can tell, most of the time we are not even aware of these patterns, of how attached we can be to our convictions and how much they condition our understanding and engagement of the issues confronting our roles. My sense is that in a context like higher education where we are working hard to demonstrate intelligence and expertise – and to generate impact of course –, the need to assess our relationship to these defensive patterns frequently goes unnoticed, often at a detriment to all of us. Our smartness may be stripping us of the real curiosity and humility that we need to engage our roles effectively. And we may not even see it. I worry our attention may be in the wrong place; our muscle for self-observation may be atrophied.

Educational discourse doesn't offer enough insight into the kind of awareness educators need to engage effectively. Although literature on educational leadership highlights the complex challenges educators face in the classroom and in school reform, few studies investigate the mental capacities that these challenges demand to engage them effectively (Heifetz, 2006; Helsing et al., 2008; Mehta, 2013; Noonan, 2014; Wagner et al., 2006). Of the studies that attend to these capacities and the institutional structures that foster them, none give enough attention to the dynamic fluctuation of educators' defensive and recuperative behaviors while engaging in this work. As a result, educators lack the framework they need to distinguish between self-protection and a genuine desire to support learning.

In this article, I explore how educators make sense of their experience when confronting adaptive challenges during teaching and in inter-faculty dialogue. I examine the awareness they bring to the defensive and recuperative behaviors driving their actions and how this awareness affects their sense of efficacy in facilitating learning among their students and colleagues. By exploring educators' experiences of these processes, this study offers insights into the kind of self-observation that is needed to facilitate learning and change in our roles. I argue that in order to meet the challenges of higher education, a more nuanced and vigilant relationship to our drive to action is needed. We need to better understand the reactive patterns driving our behavior and we need to strengthen our recuperative mechanisms to extract us from them quickly. In short, we need a more conscious relationship to our *drive to influence*.

The Drive to Influence in Higher Education

I define the drive to influence as the desire to meaningfully affect direction and outcomes, the impetus moving us to act and generate change. At the heart of this definition is the notion that we as educators are driven to take action to ensure the aims of higher education are fulfilled. The consciousness that we bring to this process and how this affects our ability to support collective learning and thriving is at the heart of this paper. In this article, I draw on volition research to highlight the limited awareness we bring to our drive to take action. I also apply theories of adult development to analyze the increased awareness we can bring to the processes driving our

behavior. Finally, I draw on adaptive leadership theory to describe the mental capacities and the awareness educators need to have to confront challenges effectively. Overall, I investigate the complex and dynamic mental processes underlying our drive to confront challenges and how our awareness of these processes affects our capacity to generate learning.

The idea that we are driven to influence change on behalf of certain goals and that we may have limited awareness of the mechanisms underlying this drive draws from the study of volition. The literature on volition analyzes the process by which we "decide" to engage in certain behaviors; the mechanisms that define our will to action (Dijksterhuis & Aarts, 2010; Haggard, 2008). Growing research in this field suggests that the awareness we bring to our purposes for action varies and that our intended behavior is not always conscious (Bargh et al. 2001; Dijksterhuis & Aarts, 2010; Haggard, 2008; Libet, 1985; Soon et al. 2008). Thus we may be driven to act on behalf of certain goals without necessarily being aware of those goals or actions. The research on volition challenges our fundamental assumptions about the awareness and control we actually have of the processes driving our behavior. If our awareness of our volition to take action is indeed limited, this raises important questions about our capacity as educators to confront challenges effectively.

At the same time, volition research lacks a developmental framework for analyzing the increased consciousness we can bring to our actions and the psychological processes that lead to our growing awareness. According to adult development scholars, human beings make meaning of their experience in increasingly complex ways as a result of gradually becoming aware of elements in their thinking that they were previously unaware of (Kegan, 1982, 1994; Torbert, 2004). This growing awareness is what enables us to progressively disembed from our current mindset and develop a broader, more inclusive one. Two interdependent processes are constantly in tension in this dynamic: self-preservation processes aimed at protecting our current way of thinking and self-transformation processes aimed at broadening our perspective (Kegan, 1982, 1994; Piaget; 1952). In this study, I refer to these processes as *defensive* and *recuperative* mechanisms, respectively, and explore the way these mechanisms mediate our drive to generate learning, both in the classroom and our broader professional setting.

Various constructive-developmental studies support the idea that we engage in defensive and recuperative behaviors in our drive to affect change and, like the literature on volition, that we have varying awareness of these processes. One is Kegan and Lahey's (2001; 2009) immunity to change framework, which illustrates the fundamental role that our defensive mechanisms play in managing anxiety and disequilibrium when our mindsets feel challenged. Two other recent studies by Livesay (2013) and McCallum (2011) assess the fluid role that our defensive and recuperative mechanisms play in our experience. These studies highlight that under certain circumstances, we not only tend to protect our current way of thinking but may also regress momentarily to a less complex mindset, losing access to our broadest capacities. These studies also illustrate our varying ability to draw on inner resources to bounce back and recover from defensiveness. Livesay and McCallum's findings suggest that these momentary relapses can occur in all of us, regardless of our mental complexity. This study is an exploration into the way educators relate to these defensive and recuperative processes in their drive to influence change and how this relationship affects the efficacy of their actions.

Defensiveness and Recovery in the Face of Adaptive Challenges

We engage in defensive behaviors in both technical and adaptive contexts. In the face of routine problems where our authoritative expertise is called for – what Heifetz (1994; Heifetz & Linsky, 2004) terms technical challenges – our self-confidence can lead us to engage arrogantly or blindly. The same pattern can occur in moments of crisis where our own expertise and skills can deceive us (Heifetz, Grashow, & Linsky, 2009). Moreover, in situations where there are conflicting perspectives or where gaps emerge between a group's values and what is needed – what Heifetz terms adaptive challenges – we tend to give into reactive and defensive patterns as well.

Although we seem to engage in defensive behaviors regardless of the type of learning situation we face, I chose to explore our drive to influence learning in adaptive contexts. Mobilizing adaptive learning demands a complex set of mental capacities and skills. According to Heifetz (1994), adaptive challenges require taking a systemic perspective and acknowledging that no clear solution exists. They require having curiosity and humility about the limitations of our own views and the ability to engage

multiple, even opposing perspectives. In developmental terms, adaptive challenges require a paradoxical ability to have a point of view without holding it as absolute (Kegan, 1994); to hold our ideas, standards, and goals tentatively. Heifetz argues that adaptive work demands an experimental mindset constituted by a tolerance for uncertainty, conflict, and error. Given that many of these skills require mental capacities that many educators may not yet possess (Kegan, 1994; Helsing, D., Howell, A., Kegan, R., & Lahey, L., 2008), this article is an exploration into the psychological processes that both prevent us and bring us closer to engaging them. By investigating our mental processes in adaptive challenges, this study offers insights into the kind of self-observation that is needed to engage these challenges effectively.

By analyzing our drive to mobilize adaptive learning I am examining our volition to exercise leadership. Heifetz (1994), together with a growing number of scholars, views leadership as an activity that can be exercised from any position in a social system (Heifetz, 1994; Lichtenstein, Uhl-Bien, Marion, & Seers, 2006; Petrie, 2014; Uhl-Bien, Marion, & McKelvey, 2007). He defines leadership as mobilizing adaptive work, the orchestration of a collective learning process that addresses contradictions in the values people hold and the reality they face. Adaptive work requires individuals to revise and adapt their values, beliefs, and behaviours in order to develop new capacities and thrive. When we view leadership as an activity that mobilizes adaptive work we can examine the mental capacities that are needed to facilitate this kind of learning.

Methods

In this article I use interpretative phenomenological analysis (IPA) (Smith, Flowers, & Larkin, 2009) to examine the experiences of four members of an instructional team in a higher education institution in Chile. My aim was to explore the way they made meaning of defensive and recuperative mechanisms present in their drive to influence learning. I specifically wanted to understand how they related to these processes when facing adaptive challenges while teaching and in inter-faculty dialogue and I wanted to know how this relationship affected their sense of effectiveness in action. By examining the experiences of the team, this article aims to offer insights into

how educators relate to their defensive and recuperative processes when leading adaptive change in their roles.

I chose IPA as a method because it focuses on the nuances of how individuals experience a phenomenon. Although it shares important features with a grounded theory approach, IPA's aim is to explore the meaning participants give to experience and to describe the experiential features of that account. By contrast, as Smith et al. (2009) suggest, "a grounded theory study of the same topic [was] likely to push towards a more conceptual explanatory level" (p. 202). In other words, I wanted this analysis to be intimate and incisive: intimate in the sense of close to our lived experience and incisive in terms of honing in on some of the subtle mental patterns that affect us in the midst of action. I hoped that through this study, each of us might see some aspect of ourselves in our failings and momentary successes grappling with our inner processes. I felt that engaging in an overly conceptual discussion would take away from the central aim of the study.

Over the course of a year, I observed members of the instructional team teaching courses and attended their monthly faculty meetings. I chose to explore their experiences in teaching and inter-faculty dialogue because I feel these are two of the most challenging contexts educators in higher education face when trying to mobilize learning and change. During their classroom sessions and meetings, I collected field notes. After each of these sessions I analyzed my field notes and wrote memos and reflections to refine data collection for subsequent interviews. Overall, I conducted and transcribed six in-depth semi-structured interviews with members of the team, using IPA principles to analyze the data.

I decided to study members of the same faculty team instead of random, individual educators because I was interested in providing a more in-depth picture into the contexts and challenges they faced, at an individual and collective level. The primary criteria for selecting the faculty team was based on their collective commitment to explore the ways in which they sometimes reacted defensively as well as the ways they recovered or kept defensive reactions at bay. It was of particular interest to me to explore their experience in instances where I was present because it could provide me with greater understanding of the phenomenon. Being an educator in higher education myself, the selection criteria was narrowed further because I was asking participants to engage in a level of candidness and vulnerability that is uncommon to do with one of their peers.

The process I used to identify themes in this study was cyclical. First, I identified emerging themes from the first set of interview transcripts. I then used these themes to guide data collection during participants' classroom sessions and meetings. In the sessions I collected field notes and wrote memos which I then used to test and revise the original themes from the transcripts. I subsequently conducted a second set of interviews which allowed for a further revision of the themes. The interviews also generated new themes which were again tested and revised against prior field notes and memos.

There are two types of general themes that emerged from the study, a) defensive mechanisms that are characterized by an unconscious drive to protect values, standards, and goals that participants adhere to and b) recuperative mechanisms that are characterized by the deliberate activation of strategies that broaden participants' mindsets. I chose to explore how the phenomenon was experienced by one member of the instructional team. I selected Pedro because I felt his experiences illustrate the complexity, dynamism, and range in which the phenomenon manifested. His case was also useful for elucidating certain considerations and implications about how our relationship to these processes might affect our capacity to exercise our roles effectively.

Case Study of Pedro

Pedro has been teaching in higher education for his entire professional career. He first taught economics and later transitioned to teach graduate courses on education policy. From the beginning of his career, Pedro knew he wanted to work closely with people. Although he admits he never wanted to be an academic, he always felt that the classroom enabled him to generate meaningful impact. Pedro is currently the Director of the Department of Education at one of the highest-ranking higher education institutions in Latin America. In an average academic year, he spends 300 hours teaching and 500 hours in meetings.

Pedro revealed that throughout his career he had always had strong aims, aspirations, and standards. Like many educators in higher education, he felt driven by a deep sense of purpose and a vocation to generate impact. "We are not here just to live and get by", he told me; "you have to make a difference, you have to leave a mark". Pedro recognized that his vocation to

generate impact meant he carried a big weight of responsibility on his shoulders. He identified strongly with the Jewish dictum "the greatest legacy the Jews have left to humanity is our permanent dissatisfaction". Indeed, Pedro's tendency towards dissatisfaction had fueled his drive to create and improve much of what he had achieved in his career. At the same time, because of this tendency, he felt moments of peace were few and far between. Pedro talked about his desire to improve his relationship to his standards and goals in order to reduce the anxiety and frustration he felt when things didn't go according to plan. In his view, his relationship to his drive to generate impact affected not only his ability to engage strategically in certain contexts but also his overall wellbeing.

Pedro experienced an internal struggle between competing aims and values. On the one hand, he felt a dominant urge to move faster and make decisions quickly, to be practical and more authoritative with where the department needed to go. On the other, he knew from past experience and personal failings that the types of initiatives the department was engaged in required time and collaboration; he was aware he didn't have all the answers. Although Pedro held both of these competing values and negotiated between them, certain contexts triggered his default towards dissatisfaction more easily. In these instances, Pedro often felt an urge to make decisions quickly on the basis of practicality and efficiency. He also tended to judge negatively those not aligned with his objectives. Pedro often felt ineffective in these instances because, in his view, his volition to take action was based on imposing his own point of view rather than on facilitating work on the issue obstructing progress.

Pedro's tendency to operate this way suggested the activation of a defensive mechanism – namely, a desire to protect certain values and goals he adhered to. He felt that his identity was at stake if these values and goals were not achieved. Furthermore, this defensive drive manifested in predicable ways in Pedro. One, which he described as his greatest default behavior, was to immediately judge negatively those responsible for hindering progress and to take action based on that judgement. His experience of this defensive drive was a mixture of anger, frustration, and impatience, accompanied by behaviors ranging from exiting the situation, moving faster, or imposing his view, depending on the context. A key feature about the way Pedro described this defense mechanism – and its ensuing mental, emotional, and behavioral patterns – was that it wasn't

chosen: his response was simply an unconscious, automatic reaction to protect certain values that constituted his identity. In so far as his volition to act was made up by this unconscious drive to protect certain values and goals, his ability to see alternative options for engaging difficult issues strategically seemed limited.

At the same time, various life experiences had taught Pedro that succumbing to these defensive mechanisms was detrimental, especially judging and acting prematurely.

> My default is to immediately emit judgment and stick with my interpretation, which aligns with what I'm feeling. Over time, I have become increasingly conscious of my tendency to make judgments quickly and this greater awareness has enabled me to gradually make changes in my behavior. Also, I have committed a lot of errors in the past as a result of taking action based on premature judgments. Because of these experiences, I have been gradually and intentionally learning to respond differently.

Pedro shared that he had developed a strategy to counteract his tendency to judge and act prematurely. Whenever he experienced a negative reaction because of someone not aligning with his expectations, his aim was to not buy into his immediate interpretation and seek alternative ones. "Part of my learning has been to not emit judgement with respect to what the person is doing that is making me react; to open up to different interpretations on the basis of what is happening and not stick with the one that is most convenient for me". The strategy seemed to operate as a type of recuperative mechanism for Pedro because it enabled him to distance himself from an interpretation that was aimed at protecting and reaffirming his thinking rather than at understanding the situation more broadly. This recuperative mechanism enabled Pedro to expand his thinking by allowing him to integrate information and experience that did not align with his current mindset. By broadening his perspective, he decreased the likelihood of responding misguidedly.

Pedro acknowledged that activating this recuperative response required effort. "Seeking different interpretations is not a natural or automatic response for me, I have to work to generate it. In the past three years I have begun to do this more easily and habitually". He also mentioned that his

ability to activate this kind of mental response was mediated significantly by contextual factors and by who was generating the initial negative reaction.

> A lot of that has to do with context – when I'm more anxious and on the run it feels much more difficult. Also, my capacity to seek different views varies in relation to the individuals involved. That is why validating and trusting those that are challenging me or generating aversion is important.

This revealed interesting features about the nature of Pedro's recuperative mechanism. First, stress played an important role in being able to generate different interpretations about the situation. The calmer and less rushed he felt the more accessible the recuperative response would be. Second, his capacity to generate alternative interpretations was facilitated by his validation of those challenging him. If the person challenging him met these criteria, Pedro felt more capable of questioning his own view. If the person was not someone he trusted however, the recuperative mechanism felt less at his disposal. The availability of Pedro's recuperative capacity thus depended, in part, on the values and criteria he used to validate others. We could hypothesize that if Pedro validated anyone who provoked him, his ability to seek different interpretations would amplify significantly.

The defensive and recuperative mechanisms that Pedro described illustrate some of the emerging themes of the study. All participants described experiences of feeling defensive, both while teaching and during faculty meetings, constituted by a drive to guard values, standards, and goals they adhered to. For instance, one of the members of the department conceded that he tended to disregard students who showed disengagement in his courses because their behavior was contrary to the attitude of engagement he expected. Another team member reported how when he felt a loss of authority in the face of his students, his need for validation sometimes triggered default patterns in his attitude and teaching aimed at recovering their validation, regardless of whether these behaviors aided their learning. When participants described a volition to act on the basis of this kind of self-protection, they almost always shared a sense of feeling contracted and succumbing to reactions that weren't useful for facing the situation effectively. Their experience of defensiveness was associated with an inability to see certain variables in the situation and in themselves. When

captive of these patterns participants reported that their thinking felt clouded and their creativity impaired.

Members of the instructional team also described experiences of recovering from their defensiveness or resisting defensiveness as a result of enacting certain strategies that broadened their mindsets. These strategies included seeking different interpretations about the situation, generating empathy towards others, embracing mistakes, and asking others for help. In addition, the deployment of these strategies hinged on both psychological and contextual factors. Psychological factors constituted the principles and standards that participants drew on to activate their recuperative response. These included recalling past experiences of success and failure with similar challenges, validating those that were challenging them, and connecting to a sense of purpose. Contextual supports included having predictability and structure when addressing difficult issues, having group members play roles that enabled them to take perspective, having an environment of trust and vulnerability in the group, having supportive others listen to them and challenge them, and having quiet spaces to recharge and gain perspective.

Faculty Meeting 1

It is a cool, fall morning in Santiago and the faculty team is trying to move quickly through the day's tightly packed agenda. After covering various administrative points, Pedro asks if there are any additional items anyone would like to add. Maria, an adjunct instructor charged with developing a new course, suggests discussing an issue relating to the type of curriculum she is expected to cover. She disagrees with the curriculum originally proposed by Pedro and would like to discuss the issue. Surprised and somewhat frustrated, Pedro suggests addressing Maria's issue first. A debate shortly ensues between them with Pedro gradually becoming more argumentative and impatient. After significant disagreement, Pedro states decisively that the course should be designed according to the curriculum he had envisioned. Maria falls silent and becomes increasingly affected by Pedro's intervention. Near the end of the meeting, Maria shares with the group that she felt completely marginalized by the way Pedro engaged her perspective. I later found out that Pedro called Maria after the meeting to apologize and discuss the issue more thoroughly.

Two days after this meeting, I interviewed Pedro to understand how he had experienced his volition while addressing the issue with Maria. I wanted to see what internal processes may have been activated in him, especially the possible ways he may have felt defensive as well as any mechanisms he employed to gain a broader perspective. As we began discussing the event, Pedro told me that prior to Maria raising the issue, he had a preconceived idea about the curriculum the new course should be based on. He was surprised Maria disagreed and felt overpowered by his reaction to the news:

> Suddenly, I found myself in the middle of a conversation where I realized Maria didn't share my view. Instead of stepping back and opening up a conversation to understand Maria's stance, I went directly to the argumentative thing of why I thought things needed to be a certain way.

When I asked Pedro to describe the emotions he felt as he began to debate with Maria, he responded emphatically, "Frustration, frustration at the need to be more practical in many of the things that we do". He also attributed feeling overpowered by his reaction to certain situational factors. "I think it had largely to do with the fact that the timing and context were inadequate to address the issue. The issue was not even on the agenda… there was a feeling of having to accelerate the discussion and not have it be eternal". At the same time, Pedro recognized the costs of accelerating the discussion in the manner that he did:

> The natural way of accelerating things for me is taking the argumentative path, to say exactly what I think and why I think it has to be this way. And being convinced why it needs to be this way. And so I run people over, which is literally what I did. And being aware of it too, which is the craziest part of all. I was perfectly aware of what I was doing and of others' reactions of disapproval at how I was handling myself.

An interesting feature about Pedro's reflections was that he seemed to have certain awareness of his behavior as he engaged in the discussion; he noticed other faculty members' reactions at the way he was acting. In spite of this awareness, he admits he wasn't able to change his approach:

> I realized I was doing this, how I was forcing my viewpoint and how I was raising my tone of voice, how my actions were also affecting Maria and how Daniel intervened to try to reduce the conflict. I could see all of that and nevertheless I continued being argumentative. I didn't see all of this at the beginning but I saw it at some point in the discussion.

Although Pedro felt unable to extricate himself from his reactivity with Maria, he recalled a moment near the end of the meeting where he began to recover and see the adaptive nature of the problem. He eventually realized his perspective had been incomplete, based on assumptions that were different from Maria's. They both had very different understandings of the gap this course was trying to fill in the department. Debating the curriculum was misguided because there was a lack of consensus regarding the problem the curriculum was trying to address. As Pedro broadened his understanding of the issue, he was eventually capable of taking corrective action with Maria and discussing the issue more thoroughly.

> There was a point near the end of the meeting that made me understand the different places we were standing in relation to the course. This is when we raised the question of who we were designing the course for. In my mind, I had a certain idea of the gap we were trying to fill with the new course and three quarters into the meeting, I realized Maria had a different understanding of that gap. At that point, I realized I didn't have all the answers, all of the arguments. Right then I should have explained that I had gone overboard in how I had directed the discussion because I had been conscious of this. But I wasn't as conscious about the degree of impact I had on Maria. That was a surprise for me, I didn't see it. I should have spoken out and apologized right then, which is why I called her later that evening.

Pedro's reflections about his inner process during the meeting reveal various features about the way he related to his drive to influence. First, his experience seemed characterized by a sequence of mental processes, beginning with a defensive reaction to a team member who disagreed with his views and preferences. His reaction, in turn, drove him to engage in behaviors aimed at persuading and enforcing his views. As Pedro enacted

these behaviors, he experienced certain awareness about the impact they were having on others. He continued intervening applying the same tactics until finally taking decisive action to end the discussion. Near the end of the meeting, an issue triggered Pedro to bounce back from his reactivity and broaden his perspective. Suddenly he began to consider variables in the situation he hadn't previously seen, including the kind of impact his behavior had on group members and the incompleteness of his perspective.

The intensity and duration of Pedro's defensive reaction lasted for most of the discussion and was marked by feelings of frustration and impatience. His reaction caused him to raise his voice, engage argumentatively, use his authority to impose his view, and try to move quickly through the discussion. Overall, Pedro felt negatively about the way he handled the conversation with Maria and wished he had faced it differently; he felt he didn't engage the issue effectively because he was reacting. Pedro also noted that timing and context played an important role in his defensiveness as the issue required more time and a different space to address it.

From a developmental perspective, the defensive qualities in Pedro's volition seemed to emerge from a need to defend his point of view to ensure loyalty and adherence to his preferences. These preferences represented his value for practicality and efficiency and they were values he felt the department needed to achieve its aims. From previous conversations with Pedro, the need to be practical and efficient constituted important aspects of his identity. They were values that had played a pivotal role in achieving his vocational aims. In this instance, Pedro seemed particularly protective of them. Another interesting element in Pedro's meaning making is the way he described having certain awareness during the conversation about his actions and their impact. The quality of this awareness suggested a sense of incongruence between his actions and a different set of values he wasn't enacting. The awareness didn't change Pedro's behavior but his experience seemed permeated by this dissonance. I wondered what role this dissonance played in enabling Pedro to shift his thinking later on.

Near the end of the meeting, Pedro's defensive behaviors gave way to a recuperative response that was characterized by a willingness to question his viewpoint. His doubting of his perspective broadened his understanding, leading him to reinterpret the problem. As he integrated new information, he became increasingly critical of the way he handled the conversation and took corrective action. Pedro's response resembled the type of recuperative

strategy he had described in earlier conversations, which was to not buy into his immediate interpretations and seek alternative ones. My sense is that this strategy played an important role in Pedro's experience of dissonance because it was based on valuing others' perspectives, something he didn't do until the end of the meeting. I could see how the need to value others' perspectives countered his need for practicality and efficiency. I could also see that integrating other's views was sufficiently important to Pedro that he felt dissonance and self-critical when he didn't behave accordingly. Finally, Pedro's recuperative response had a strong contextual catalyst as it was the issue of who the course was for that made him realize he didn't have all the answers.

Faculty Meeting 2

I observed interesting variations in Pedro's defensive and recuperative processes during a separate faculty meeting later in the year. In this instance, there was a contentious item on the agenda that had been previously raised by Daniel, another member on the department. I later found out Daniel had felt frustrated and disillusioned by the way the team responded the first time he raised the issue. In his view, there was a contradiction between aspects of the curriculum the department was teaching and certain ideas Pedro had published in a recent article. Nine months of faculty meetings had gone by since Daniel first raised the issue and the team had not addressed it since. The adaptive nature of the discussion was evident given Daniel's frustration at the group and the lack of a quick fix to resolve the issue.

After going over the administrative items of the agenda, the team decided to discuss the issue Daniel had raised months before. An interesting exchange followed between various members of the team. The discussion lasted over an hour and was quite heated at times, especially between Daniel and Alvaro, another member of the department. Alvaro seemed particularly committed to defending Pedro's ideas in his article whenever Daniel challenged them. Pedro's attempts to influence the conversation varied and were noticeably different from the way he engaged Maria. At times he challenged Alvaro's assumptions, at others he supported Daniel's perspective, and at times he remained observant and listened. In one instance, Pedro acknowledged he wasn't sure how to address Daniel's concerns while at the same time ensure the article remained accessible and

practical to readers. Regardless of the content of Pedro's interventions, there appeared to be a different quality to the way he was making them. He seemed attuned to the situation and chose his words carefully.

I interviewed Pedro the following day to gain insights into his internal process during the session. I asked him whether he noticed any defensive or recuperative responses in the way he handled the discussion. He conceded experiencing a momentary feeling of aversion at the begging of the discussion because they were about to critique his work. "I remember at the beginning thinking, ok, we are going to question the premises of my article, which means potentially having to rewrite a whole bunch of things. The feeling only lasted ten seconds, however, I didn't feel overpowered by it". As Pedro described his experience, he remarked how he had felt capable of stepping back and observing the discussion, especially remaining attuned to Daniel and to his increasing frustration at the lack of progress on the issue.

> I was conscious of observing Daniel during the discussion and the tension that was being generated from not resolving the issue. I tried to act in the most open way possible in terms of not being attached to my view, on the one hand trying to address Daniel's issue and on the other trying to make sure the content remained practical to readers. And I couldn't make the match, but I searched, I didn't stay stuck with my idea. I saw Alvaro much more closed in that respect. I didn't feel frustrated at our lack of progress but I was aware it was going to frustrate Daniel, which is why I empathized with him at the end of the discussion. In this instance I felt I was able to gain sufficient perspective so that I wasn't overtaken by the issue and could remain open to something that may be of value.

Pedro sensed he had been able to influence the conversation without defensiveness in his volition. He was able to see value in the discussion, especially the opportunity it offered to improve the work of the department. He also felt his open stance enabled him to support Daniel in absorbing the loss of leaving the meeting unresolved.

When I asked Pedro what had supported him in bouncing back from his momentary reaction and maintaining an open perspective in the discussion, he acknowledged several contextual and psychological factors:

> First, there had been a designated time and space to address the issue. We had gone through the administrative items on the agenda and we still had two hours left in the meeting. Discussing any theoretical or curricular issues during that time was something I would resonate with because I was psychologically prepared for it. Second, this was an issue Daniel had already raised which meant I wasn't going to just glance over it or not give it the importance it deserved. And third, the position Alvaro assumed in the discussion. All of that helped me a lot in adopting the position I took. Had it been a different circumstance, my first reaction would have probably been, "Why do we once again need to discuss this issue when in reality the article was peer-reviewed and practitioners find it useful?". But the space was different and I was particularly attuned and Alvaro took that role. It was quite easy in that respect.

In other words, the timing, predictability, and structure of the discussion, Pedro's validation of Daniel and the issue, and the role Alvaro played all played critical factors in Pedro's recuperative capacity. Had these factors not been in place, Pedro admits it may have been harder to maintain his composure. "It probably would have demanded a lot more from me from the beginning. I would have needed to take more perspective, step back…". Similarly, the validation of the person challenging him was something that again stood out for Pedro in enabling him to remain open in the discussion. "In this instance I opened up to different interpretations in part because I knew the people involved. That is why validation of the other person is important. If there isn't validation, I tend to stick with the easiest interpretation".

Pedro's drive to influence in this instance appeared to be characterized by the triggering of a momentary defensive reaction, followed by the deployment of recuperative tactics that enabled him to bounce back quickly, and the aid of those tactics in engaging the discussion more effectively. From a developmental standpoint, Pedro's momentary defensive reaction seemed to emerge from a need to protect his professional identity and certain values he associated with it, namely, his academic credibility and the practicality of his work. The momentary threat he experienced pointed to his loyalty and identification with those values. At the same time, Pedro's drive to self-protect was so brief, it seemed he constituted himself more broadly

than those values. His ability to not identify with the values of his role allowed him to engage the issue without a defensive volition.

The minimal intensity and duration of Pedro's reaction appeared to be mediated by a recuperative response aimed at gaining distance from his own view to integrate a different perspective. Pedro's response manifested in a drive to influence that was marked by a sense of openness to the discussion, an awareness of group dynamics – including individuals' emotional states and roles –, and a capacity to support others in absorbing disappointment. Pedro described noticing these elements during the discussion, attesting to the quality of his attentiveness in the meeting. He attributed his capacity to notice these elements to his ability to distance himself from his self-image. His greater awareness contributed to his overall sense of self-efficacy in the discussion.

Finally, Pedro credited the activation and duration of his recuperative response in part to certain contextual and psychological variables. The predictability, timing, and structure of the event, his past experience with the issue, and the enabling effect of others' roles were important factors that helped him maintain an open perspective. Psychologically, the alignment of Pedro's criteria for validating others with the person challenging him was also an important aid. The supportive effect of these contextual and mental elements enabled Pedro to recover quickly from his potential reactivity and remain open to a challenging discussion.

Discussion and Implications

The mental patterns that Pedro and the rest of the instructional team manifested in their drive to influence change are supported by the literature. The unconscious drive they experienced to protect certain values and beliefs reflects the developmental idea that many adults tend to identify with and be defined by their values and belief systems during certain phases of their development (Kegan, 1982; 1994; Torbert, 2004). According to Kegan (2009), these phases are characterized by socialized and self-authoring ways of making meaning. In the socialized phase, individuals unconsciously internalize and are determined by the values of their context while in the self-authoring phase, individuals are able to question the values of their context and internally generate their own. A common feature about both of these ways of making meaning is the embeddedness and attachment

individuals experience in relation to their values, independent of where they came from. The difficulty members of the team experienced in gaining psychological distance from their values seemed illustrative of these ways of making meaning, at least while their defensive mechanism was activated. The strategies that participants enacted to broaden their mindsets are also supported by the existing developmental literature. They are reflected in McCallum's (2011) findings about the types of inner resources – what he calls adaptive self-scaffolds – that individuals draw on to learn in the midst of challenge. Participants' descriptions of the contextual supports that helped them to recover or resist defensiveness also align with McCallum's discussion on the role that holding environments play in helping individuals resist and rebound from regression.

The literature on fallback (Livesay, 2013; McCallum, 2011; Torbert, 2004) – the idea that adults can momentarily regress to less complex ways of thinking in the face of duress – adds another dimension to participants' experiences of defensiveness. For example, was Pedro's drive to impose his view on the curriculum driven by a need to preserve his current way of thinking or was it the result of a momentary relapse to protect vestiges of an older mindset he no longer used? This study did not establish this kind of distinction because its purpose was to engage in a more practical and personal discussion about our defensiveness in our drive to influence change as educators. Nevertheless, from a research perspective, distinguishing between defensive mechanisms that arise from our current mindset from those that emerge from fallback would contribute to the ongoing discussion in the developmental literature about the nature of these mechanisms and the impact they have on our capacity to mobilize adaptive learning. At the same time, the dynamic relationship that emerged between participants' defensive and recuperative capacities and the presence of varying contextual factors contributes to the existing literature that challenges the notion that developmental capacity is stable and consistent across settings (McCallum, 2011).

Based on the findings that emerged from this study, a defensive volition is characterized by unconscious loyalty and attachment to our beliefs and values. The instructional team's experiences suggest that when we dogmatically adhere to our aims and preferences, we seem more likely to constrain ourselves in our ability to lead adaptive change. Defining ourselves solely in terms of our aims and views makes us more prone to interpret

situations that challenge those aims and views as threats to our identity. Heifetz and Linsky (2002) argue that beneath this sense of threat is a feeling of losing who we are. "Habits, values, and attitudes, even dysfunctional ones, are part of one's identity. To change the way people see and do things is to challenge how they define themselves… To give up those conceptions of self may trigger feelings of considerable loss" (p. 27). If underneath our defensiveness is a threat of loss to who we are, then one way of understanding a defensive drive to influence is as a drive to control. Whether it's controlling what our peers think of us, controlling the outcome of a meeting, or controlling others' views on an issue, our drive to control seems to be our way of reducing the distress that comes from feeling disloyal to our values. The drive to control is based on our need to preserve our identity in the face of impending threat. Control, Heifetz and Linsky (2002) argue, gives stability and predictability to who we are.

Influencing on the basis of defensiveness and control is incompatible with adaptive work. Adaptive challenges require engaging multiple perspectives to co-construct solutions to problems that lack clear answers. Integrating others' views will only occur if we first recognize the partiality and incompleteness of our own perspective. Had Pedro been convinced that Daniel's issue was a waist of time, he and the rest of the department would have missed an opportunity to challenge their thinking about the ethical and practical implications of the ideas they were teaching. Adaptive work, then, demands not being attached and protective of our aims and views. It requires a psychological capacity let go of our aims and views so that we can integrate information that doesn't conform to our current way of thinking. This kind of inner stance demands a high tolerance to uncertainty. Heifetz and Linsky (2002) point out that adaptive work is unpredictable and destabilizing because it requires people to undergo a difficult process of redefining their identity without assurance of success. If as educators we become defensive when our own values and beliefs are challenged, our unconscious drive to control the situation will prevent us from engaging strategically. We cannot influence learning on difficult issues if our threshold for uncertainty is easily surpassed.

Additionally, this article highlights the potential we have as educators to recover from defensiveness and resist our drive to control. Pedro's case illustrates that the more we can deliberately activate a recuperative response without relying on contextual supports, the greater our capacity to bounce

back from defensiveness and be effective in a wider range of situations. Thus, as defensive mechanisms are characterized by a drive to control, recuperative mechanisms are characterized by a drive to let go. Recuperative processes allow us to regain our broadest mental capacities by detaching us from our perspective, challenging our assumptions, and expanding our thinking. Recuperative mechanisms increase our capacity to operate with uncertainty by driving us to let go of our preconceived notions and theories. These mental skills are essential for what Heifetz, Linsky, and Grashow (2013) describe as holding steady, the ability to remain steadfast and choose the right moment to act rather than simply react. Holding steady is not based on self-protection and control but on the conscious ability to let go of our views and aims in service of collective learning. The equanimous mental stance that holding steady requires demands a strong capacity for uncertainty.

In this study I have argued that educators need to better understand the mental patterns driving their behavior if they hope to be effective in meeting the challenges of their roles. They must develop greater awareness of the defensive patterns underlying their volition and they must strengthen their recuperative strategies to extricate themselves from them quickly. A vigilant and conscious relationship to our drive to influence is essential to embrace the uncertainty that adaptive work demands. Leading change in higher education requires constant self-observation of these inner processes. This study highlights the constraints that our defensive mechanisms pose to influencing adaptive change in our roles and the risks we run if we continue to leave them unchecked. It also points to the powerful role that our recuperative capacity can play in letting go of our convictions to deploy ourselves more consciously and strategically.

The drive to generate meaningful impact in the lives of others is lived and experienced by each of us, moment to moment, in the field of practice. From our attitude in a meeting, to the volition behind our words, to the mental stance we adopt towards our students, it is the inner stance and our observation of the qualities underlying it, that may reveal to us the tremendous work still to be done if we hope to be truly effective in our aim to serve others.

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